



Filing ID #10020679

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: John Joseph Paschen
Status: Congressional Candidate
State/District: IA04

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 04/26/2018
Period Covered: 01/01/2017– 04/1/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
First American Bank Account [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Rental Property, Ames, IA [RP] LOCATION: Ames/Story, IA, US		\$100,001 - \$250,000	Rent	None	\$5,001 - \$15,000
TD Ameritrade ⇒ CASH [BA]	SP	\$1,001 - \$15,000	None		
TD Ameritrade ⇒ CPPY [RE]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000
TD Ameritrade ⇒ DFCEX [PS] DESCRIPTION: DFA Emerging Markets Core Equity fund	SP	\$50,001 - \$100,000	None		
TD Ameritrade ⇒ DFEOX [PS] DESCRIPTION: DFA US Core equity 1 stock fund	SP	\$100,001 - \$250,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TD Ameritrade ⇒ DFEQX [CS]	SP	\$100,001 - \$250,000	None		
DESCRIPTION: DFA Short-term extended quality bond fund					
TD Ameritrade ⇒ DFESX [PS]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
DESCRIPTION: DFA Emerging Markets Social Core Portfolio					
TD Ameritrade ⇒ DFGBX [CS]	SP	\$100,001 - \$250,000	None		
DESCRIPTION: DFA five year Global fixed income					
TD Ameritrade ⇒ DFIEX [PS]	SP	\$100,001 - \$250,000	None		
DESCRIPTION: DFA International Core Equity Income					
TD Ameritrade ⇒ DFQTX [PS]	SP	\$250,001 - \$500,000	None		
DESCRIPTION: DFA US Core Equity 2 stock fund					
TD Ameritrade ⇒ DFSHX [CS]	SP	\$100,001 - \$250,000	None		
DESCRIPTION: DFA Selectively Hedged Global bonds					
TD Ameritrade ⇒ DFSIX [PS]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: DFA US Sustainability Core 1 stock fund					
TD Ameritrade ⇒ DFTEX [CS]	SP	\$50,001 - \$100,000	None		
DESCRIPTION: DFA intermediate-term extended bond fund					
TD Ameritrade ⇒ DFTIX [CS]	SP	\$50,001 - \$100,000	Interest	\$1 - \$200	\$201 - \$1,000
DESCRIPTION: DFA intermediate-term municipal bond					
TD Ameritrade ⇒ DFUEX [PS]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: DFA US Social Core Equity 2 portfolio					
TD Ameritrade ⇒ DFUEX [PS]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: DFA US Social Core Equity 2 Portfolio. Spouse(Cynthia Paschen) IRA account					
TD Ameritrade ⇒	SP	\$100,001 -	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DIPSX [CS]		\$250,000			
DESCRIPTION: DFA Inflation-protected security bond fund					
TD Ameritrade ⇒ DMREX [CS]	SP	\$50,001 - \$100,000	Interest	\$1 - \$200	\$201 - \$1,000
DESCRIPTION: DFA Municipal Real return Institutional bond fund					
TD Ameritrade ⇒ DSCLX [PS]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
DESCRIPTION: DFA International Social Core Equity fund					
TD Ameritrade ⇒ DWFIX [CS]	SP	\$100,001 - \$250,000	None		
DESCRIPTION: DFA World ex US government bond					
TD Ameritrade ⇒ GRIFX [RE]	SP	\$50,001 - \$100,000	None		
TD Ameritrade ⇒ Healthcare trust [RE]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
TD Ameritrade ⇒ HHDS [RE]	SP	\$1 - \$1,000	Dividends	None	None
TD Ameritrade ⇒ IARE [RE]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
TD Ameritrade ⇒ MMDA12 [BA]	SP	\$15,001 - \$50,000	None		
TD Ameritrade ⇒ PZA [CS]	SP	\$50,001 - \$100,000	Interest	\$201 - \$1,000	\$2,501 - \$5,000
DESCRIPTION: Power shares National AMT-Free MuniBond fund					
TD Ameritrade ⇒ RREDX [RE]	SP	\$50,001 - \$100,000	None		
TD Ameritrade ⇒ SWEEP CASH [OT]	SP	\$50,001 - \$100,000	None		
DESCRIPTION: Cash in investment account					
TD Ameritrade ⇒ VCMIX [RE]	SP	\$50,001 - \$100,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TD Ameritrade ⇒ SWEEP CASH ⇒ Mcfarland Clinic Buiding Company [CS]	SP	\$1,001 - \$15,000	Interest	None	\$1,001 - \$2,500
DESCRIPTION: Building corporation holding					
Vanguard Money Market Account [BA]		\$100,001 - \$250,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Mcfarland clinic	My work salary	\$54,000.00	\$388,000.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Chairman	Story ounty Board of Health

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- TD Ameritrade (Owner: SP)
- TD Ameritrade ⇒ SWEEP CASH (Owner: SP)

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: John Joseph Paschen , 04/26/2018